



No One Tells Your Story Better Than Members

Callahan Client Webinar Series



Nominations Are Now Open

Member Story Project Awards

The 2027 Member Story Project Awards

Help us find the stories and people that demonstrate the credit union difference.

THE AWARDS WILL RECOGNIZE

1

MEMBER STORY

Story Of The Year

Recognizes a true member story that demonstrates the credit union difference.



2

INDIVIDUAL IMPACT

The Changemaker Award

Honors the person whose actions made the moment possible.



DEADLINE

NOV. 14

11:59 p.m. ET



Share The Awards

LIVE
NOW

Share the awards with credit union contacts who may know a story or person worth recognizing.

Winners will be honored at Purpose Symposium on Feb. 10 in San Diego.

Our Speakers



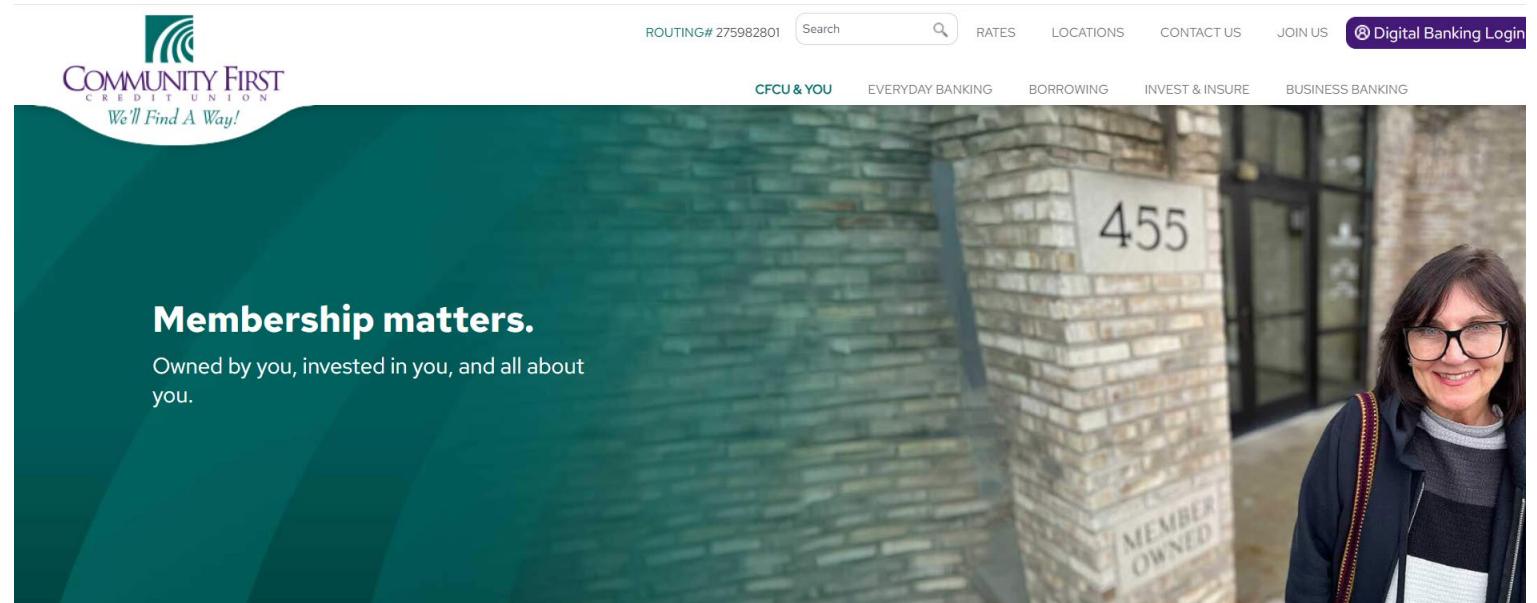
Cathie Tierney
Chief Executive Officer
Community First Credit
Union



Amanda Secor
Chief of Staff
Community First Credit
Union

About Community First Credit Union

- Neenah, WI
- Approx. \$6.8B in assets
- Over 166,000 members
- 602 FTEs
- 29 branches



The Challenge/Opportunity

- According to a recent [JD Powers' retail banking survey](#), the average retail bank checking account customer now maintains three deposit accounts at different institutions, and 20% have moved money away from their primary bank within the past 3 months, up from 17% last year.
- Consumers most likely to move money are those under age 40 (23%); those in the affluent/mass affluent wealth bracket (25%); and those who are financially healthy (24%).
- As more consumers move money away from their primary financial institutions, maintaining loyalty and showcasing the cooperative difference is critical.



The Solution

- For Community First, members' voices are an integral part of the cooperative itself.
- As we celebrated our 50th anniversary in 2025, we invited members to share why the credit union has been important in their lives.
- The collection of member stories didn't end when our 50th year did. To join in on *America's 250th* celebration and "*I Love My Credit Union Day*" this July, we launched our own "Stars, Stripes and Stories" contest.
- Over 1,000 submissions were received.
- *If we want to figure out why we do what we do, and why it matters, all we have to do is sit down and read.*

How it Works

- Utilizing a quick and simple web form with a story prompt, Community First gathered an extensive collection of real member stories.
- There was no incentive for members to share their stories *during the credit union's 50th year*, just pure pride in being part of the Community First collective.
- Some of those stories helped the team frame and create the "Because of You" video series, *which was developed using the same theme as our 51st annual meeting*.
- The series was produced for a limited distribution as it was *shared with employees and then shown during the annual meeting*.
- While the credit union isn't on social media, except for LinkedIn, we do believe strongly in the power of member voices and we *often incorporate them into our marketing and promotional activities*.

“Because of You” Video Series



Community First Credit Union | Wisconsin

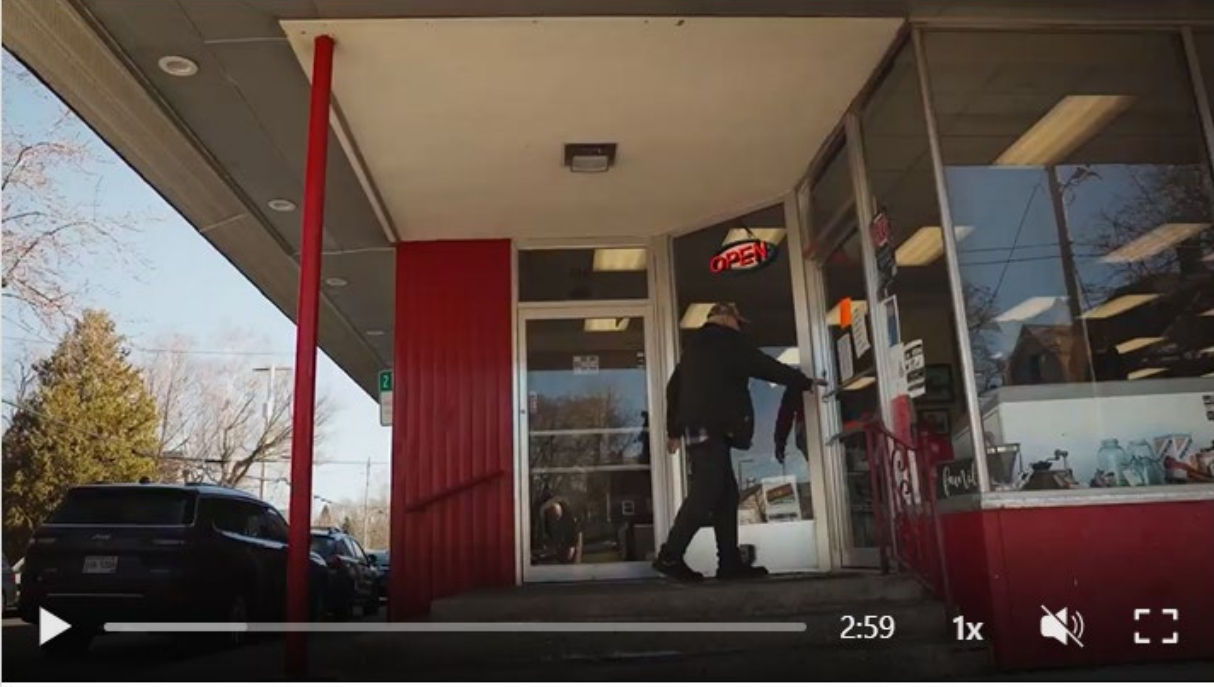
+ Follow

...

4,130 followers
2mo • 🌐

At Community First, we often talk about the ripple effect of our mission. But there is nothing quite like hearing it directly from local business owners who pour their hearts into our communities. It's our honor to work closely with Luke, Julie, Shane, Barb, Janece & the thousands of other member-owners to help with their financial needs.

😊❤️ Check it out! We recently captured some great stories from some of our small business member-owners for our "[#BecauseOfYou](#)" video series.



An example of Community First's “Because of You” video series, which focuses on why the credit union matters to local businesses and has been shared on LinkedIn.

<https://www.linkedin.com/company/community-first-credit-union-appleton-wisconsin/posts/?feedView=videos>

Celebrating the Cooperative Difference

- We take a thematic approach to our annual meeting each year. The “Because of You” concept came from one of our IT executives. *Everything we do is because of them and no one can tell the story better than our members can.*
- Over 1,400 people attended our annual meeting, which is offered in-person and livestreamed. *It’s a vital touchpoint to call out the cooperative difference.*
- In fact, it’s been a hallmark over the course of the credit union’s 51 years to focus on the fact that the organization belongs to its members and let them know they have a voice, a say, and a vote.
- *A lot of people think members don’t care about the cooperative difference or are more concerned about low rates, but they certainly won’t if you don’t tell them the difference.*

Continuing to Let Members Tell the Story



920.830.7200

I brought my son in to get his first car loan. We needed the loan quickly as he was on leave from the Army. He was approved and was able to get back to Fort Carson with his new car.

- Teresa M.

I got married when I was 18 and my husband was 20. Community First was our very first banking experience and has been with us through 44 years of marriage coming up this year!

- Deb V.

Excerpts from the Stars, Stripes & Stories contest. One member from each branch was selected as a winner, receiving a \$250 gift card for themselves and another \$250 to support one of four veterans' causes. One \$2,500 grand prize winner was also selected.

<https://www.communityfirstcu.org/ilovemycu>

Creating an Open Dialogue

- When we invite members to share their stories, we take a gentle approach and always lead with the cooperative difference. *It's never couched in a way that Community First is looking for stories for our ads, it's about the importance of membership and why member ownership matters.*
- It's just another part of the open dialogue we've created over the years with members, from *inviting them to ask questions when they register for the annual meeting* to *letting them know their voice matters* in every interaction.
- The cooperative difference is clear and the positive feelings between the credit union and its members are mutual. *We couldn't imagine this organization without the voice of our members, they are inseparable.*



Questions?

